PSWG Methodology

Business Strategic Realignment

Revision Date
April 21, 2011

Business Strategic Realignment

Purpose

It has been almost three years since the development of the AMIT projects and their corresponding requirements. During that time there have been changes in both the Texas Market business processes and technologies including development of solutions such as Smart Meter Texas and implementation of 15 minute interval data.

Therefore it is an opportune time to strategically realign AMIT projects and requirements to be the most effective based on the critical needs of the newly evolved Texas Market.

Also, it is an opportune time to refocus efforts into areas of most impact, renew activities and tasks that support driving to completion those efforts, and reset expectations for delivery priorities, timeline, and dependencies.

Business Strategic Realignment

Objectives

Based on recent lessons learned, enhanced knowledge from experience, current business and technology environments of the evolving Texas Market:

- Realign the AMIT business processes based on the current highest priority and most critical needs
- Identify initiatives to effectively and efficiently deliver the realigned business processes
- Roadmap the identified processes, functions / initiatives for clear understanding of delivery ranking, timelines and dependencies
- Refocus efforts based on the re-prioritization and realignment
- Gain renewed consensus, buy in, participation and enthusiasm from AMIT Market participants

Business Strategic Realignment

Approach

Prep	Examine	Assess	Plan	Implement

Accomplishments
- Review and identify accomplishments to date

Consensus
- Review and gain buy in on AMIT strategic realignment purpose, objectives and approach

Third Party One-on-Ones
- Gather third party requirements
- Define Processes and Functions

Current Business Model
- Review and understand current major business processes impacting the Market
- Review current functionality matrix

Current Technology
- Review and understand current solutions impacting processes and priorities

Decompose
- Develop process decomposition model to sub process level 2

Identify Market goals and objectives

Constraints
- Identify Market constraints
- Identify current technology constraints

Prioritize
- Prioritize business sub processes

Roadmap
- Initiative roadmap based on priorities, timeline, and dependencies
- Define Milestones

Functional alignment
- Identify business functions
- Prioritize functions

Function Goals and Critical Success Factors (CSF)
- Identify goals
- Identify CSF

Expectations
- Set renewed Market expectations
- Communicate strategy and scope

Identify Key Stakeholders

Schedule

Functionality Matrix
- Identify key functional components

Refine Requirements

Design / Develop / Deploy

Assess Goals and CSF

Review and Renew Strategic Alignment
- Renew Priorities
- Renew Roadmap
- Review Milestones

Realign

- This work can be completed within the time frame of the currently scheduled AMIT working sessions in August , September and October

Roadmap

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AMIT Vision/Themes for Functional Scoping (Starting Point – PSWG Needs to Complete including PSWG vision discussions and PSWG charter goals, etc…)

Vision/Themes for 2011 – From February 8, 2011 AMIT Meeting

- Increase customer usage of SMT and HAN (PSWG Task 014)

- Provide opportunity for Market participants including REPs and Third Parties to increase offerings and products by implementing modifications to current functionality or implementing currently identified new functionality

- Provide a Secure Solution

- Achieve specific level of performance in existing and future functionality

Working Groups

2007 thru Q3 2009	Q4 09	Q1 10	Q2 10	Q3 10	Q4 10	Q1 11	Q2 11	Q3 11	Q4 11	Q1 12	Q2 12	2012 & beyond

Registration, Admin & Access

Lead PUCT Staff – Therese Harris
Co-Lead (REP) – Michael Matlock
ERCOT – Jackie Ashbaugh
TDSP Committee – Carole Root
Facilitator – Jenina Smith

- SMT Market Ed
- Integrated Ed Lessons Learned
- Consumer Ed Strat
- Market Ed Strat
- Deploy Education
- Define Enhanced Gov Model
- Promo Strat
- Deploy Promotion

Projects and Strategy

Lead – Donny Helm
Co-Lead – Jim Sheppard
Back Up Lead – Bob Frazier
ERCOT – Betty Day
PUCT Staff – Christine Wright
Market (REP) – Craig Tinder
AMIT PM – Andrea O'Flaherty
HAN DOC(s) - TBD
Facilitator – Jenina Smith

- SMT Release 2.1
- SMT Issues & Lessons Learned
- SMT Tactical Scope
- * SMT Strategy Prioritized Functions and Future Releases
- SMT Strategic Scope
- TDSP Pilots
- Market Pilots
- AEP HAN Integrate
- Integrated Pilot Lessons Learned
- HAN Tactical Scope
- HAN Strategic Scope
- HAN Releases
- HAN Future SEP 2.0
- Low Income HAN Deploy
- Third Party Access to Energy Data Strategy
- Han Service Provider Strategy
- Event Strategy
- Events Releases

Operations and Maintenance

Lead - Tom Olinger
Co-Lead (REP) – Jay Foliano
ERCOT – Karen Farley
PUCT Staff – Rebecca Reed
Market (REP) – Mark Smith
Market (REP) – Jennifer Frederick
HAN DOC(s) - TBD
Facilitator - Jenina Smith

- EnhanceSMT and HAN Support
- SMT and HAN Ops Strategy
- SMT and HAN Operations
- Strategy Integrate AMIT Market Support
- Deploy Integrated Support

Security

Lead - Denny Daugherty
Co-Lead – TNMP TBD
PUCT Staff – Alan Rivaldo
ERCOT – TBD
REP – Johnny Robertson
Facilitator - Jenina Smith

- Security Monitoring and Operations

Business Strategic Realignment

Methodology

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┌─────────────────────────────────────────┐
│  SMT Strategic Scope                     ▶
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│  HAN Strategic Scope                     ▶
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Vision / Themes
(Example –Increase Customer Usage)

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Business Functions
(Examples - Event Notification and Consumer Mobile Experience)

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Functional Review and Assessment
Step 1 – Review Usage and Benefit to Market
Step 2 – Assess Qualifications and Parameters

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Use Cases

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Pre-existing AMIT Requirements → ## Renewed Requirements